

# Travel Montana

# Website Evaluation

[skiMT.com/winterMT.com](http://skiMT.com/winterMT.com)

Initial Website Intercept Study &  
Follow-up Conversion E-mail Study

July 2007



the sixth sense of business™

# Methodology...

## Initial Website Intercept Study:

- From Oct.–Nov. 2006, 527 visitors to the skiMT.com / winterMT.com website answered a pop-up intercept survey regarding their perceptions of Montana & the website, demographics, site usage, and travel intentions & behaviors.

## Winter Conversion Study:

- Sample was drawn from participants of the skiMT / winterMT winter website intercept survey of Oct.–Nov. 2006.
- 464 website visitors were e-mailed a follow-up survey in late Apr. 2007
- 156 people answered the follow-up survey.
- 72 survey participants traveled to Montana during the winter for leisure.
- The survey was administered online by TNS.



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Who uses

What do the visitors

Why want on the

What is do they use it?  
How many will

Is the website Effective

travel here?

in bringing more?

# Winter Website Evaluation Review

- Profile of Montana's winter website visitor and traveler to MT (p.6)
- Website usage (p.13)
- Montana's image (p.18)
- Travel intent, and confirmed action (p.21)
- Website effectiveness (p.24)
- Feedback for potential website improvements (p.29)
- Conversion of website visitors to Montana leisure travelers (p.31)
- Recommendations (p.47)

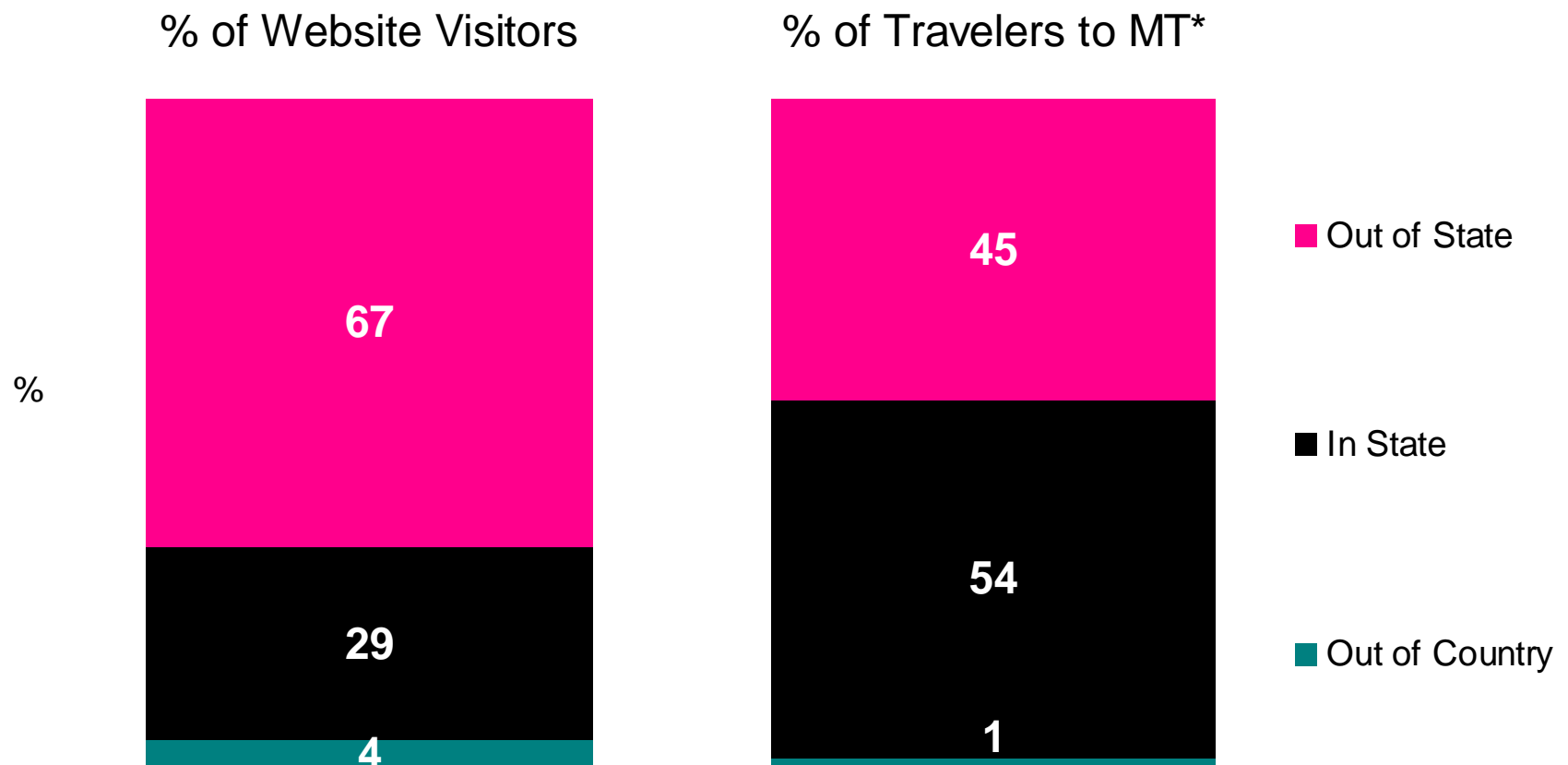
# Profile of Website Visitors...

And those that  
traveled to MT.

# Majority of website visitors are from Out of State

Majority of website visitors that took a leisure trip in MT are local

Where Do Website Visitors Live vs. Montana Travelers?



N=527

N=72

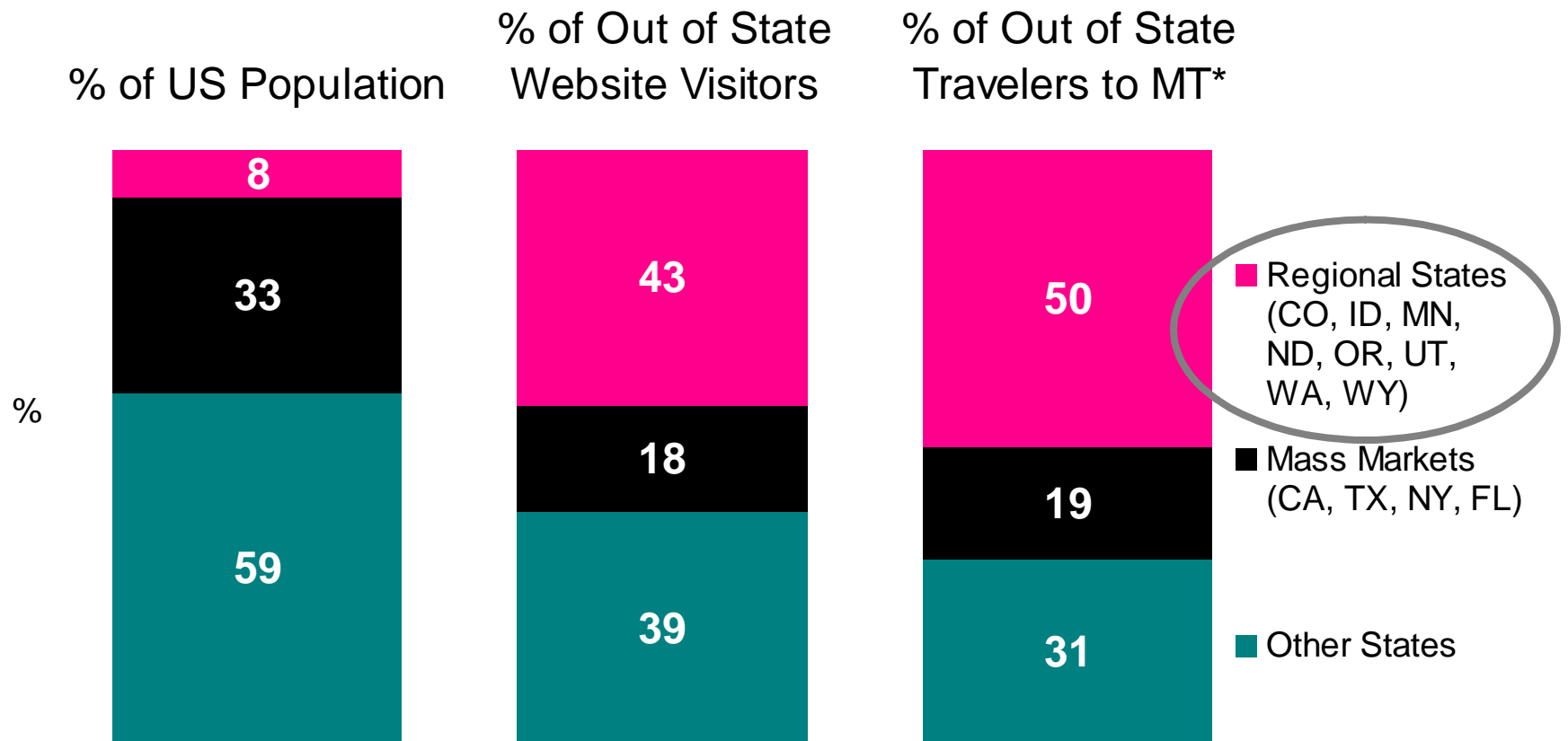
Small Base

\*participated in follow-up survey

# Regional states are a key segment

Washington state is the #1 source of website visitors

Where Do Out of State Website Visitors Live vs. Montana Travelers?



US  
Census

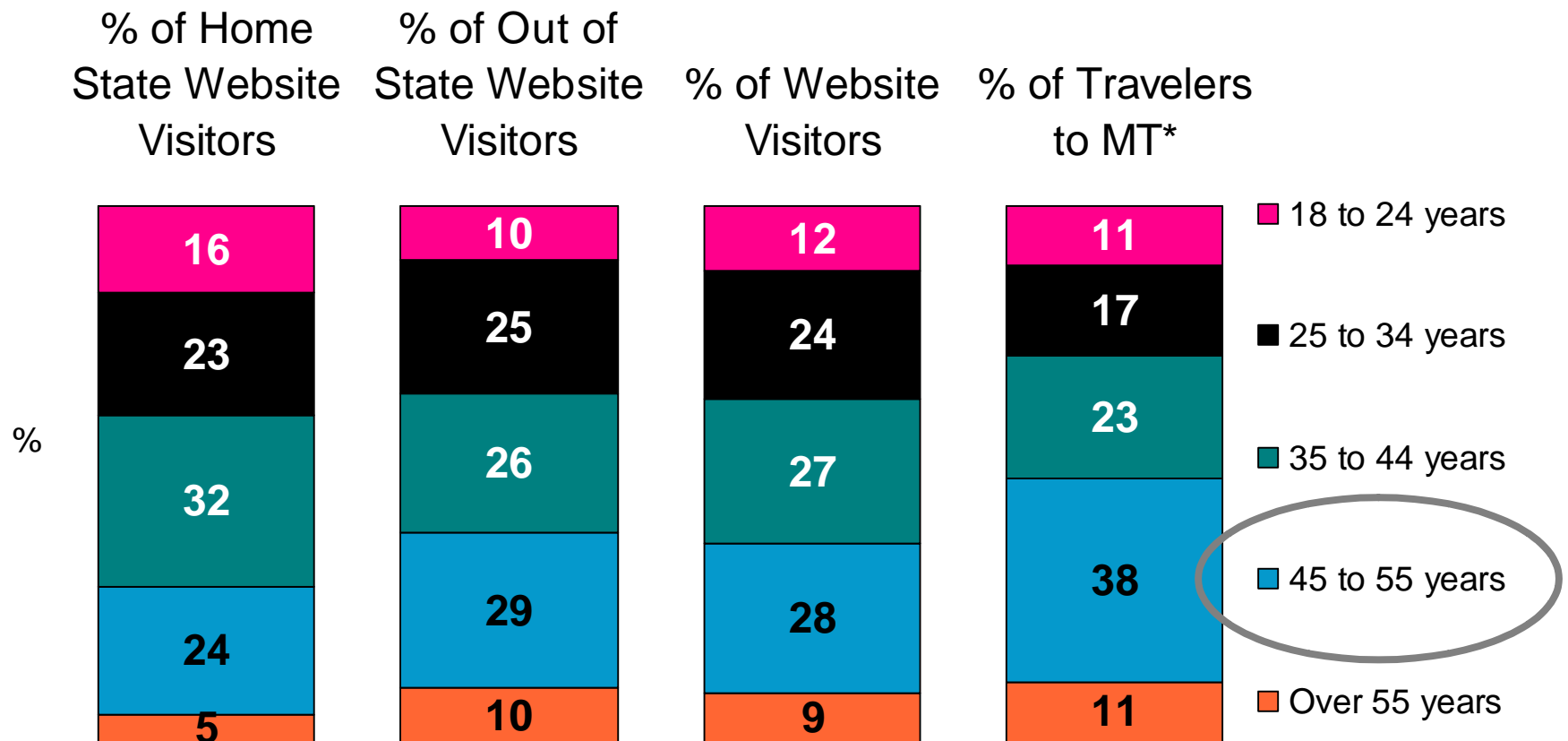
N=376

N=33  
Very small  
base

\*participated in follow-up survey

# Younger Baby Boomers are key website visitors

## Age of Website Visitors vs. Montana Travelers?



N=151

N=376

N=527

N=72

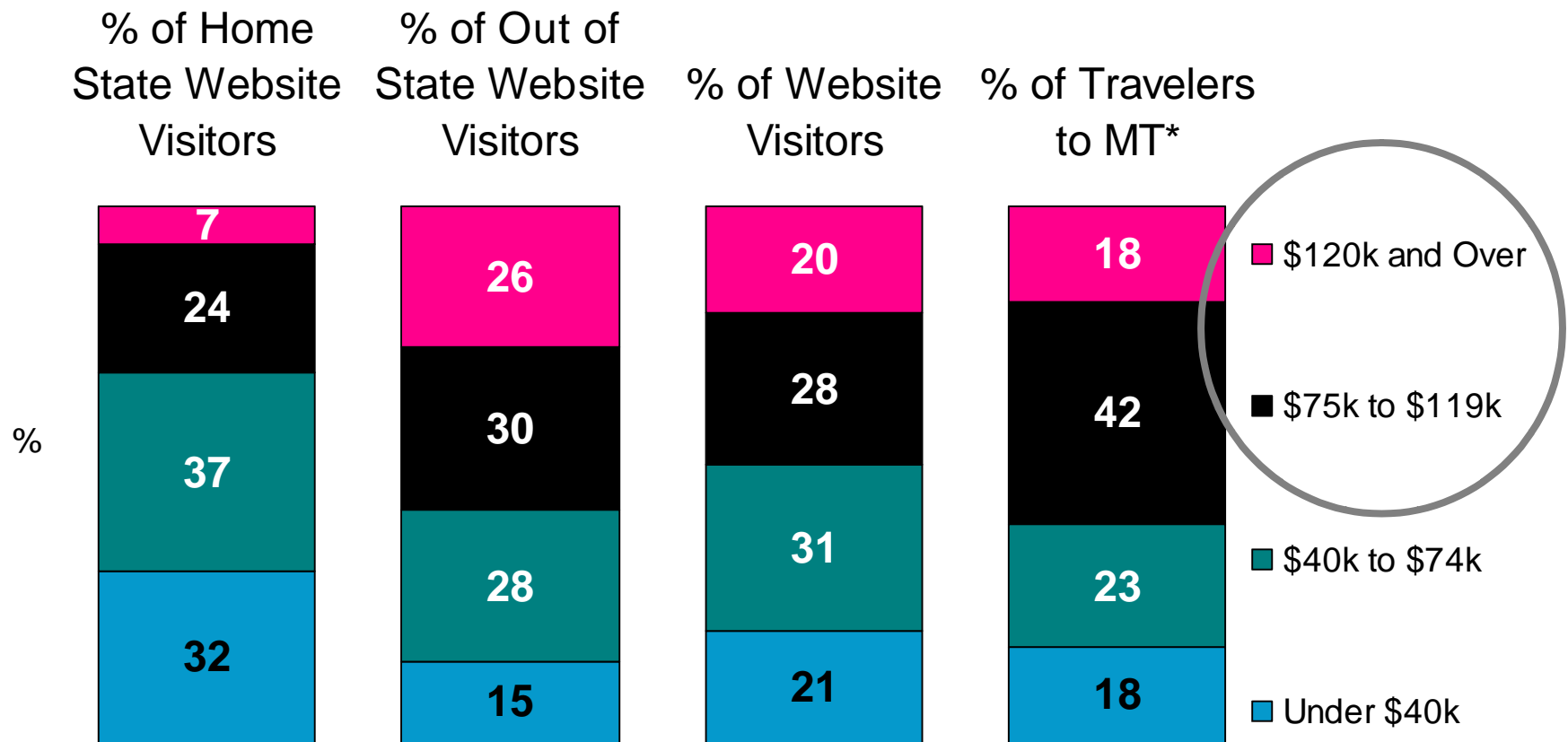
Small Base

\*participated in follow-up survey



# \$75,000 plus group is a key website visitor group

## Income of Website Visitors vs. Montana Travelers?



N=151

N=376

N=527

N=72

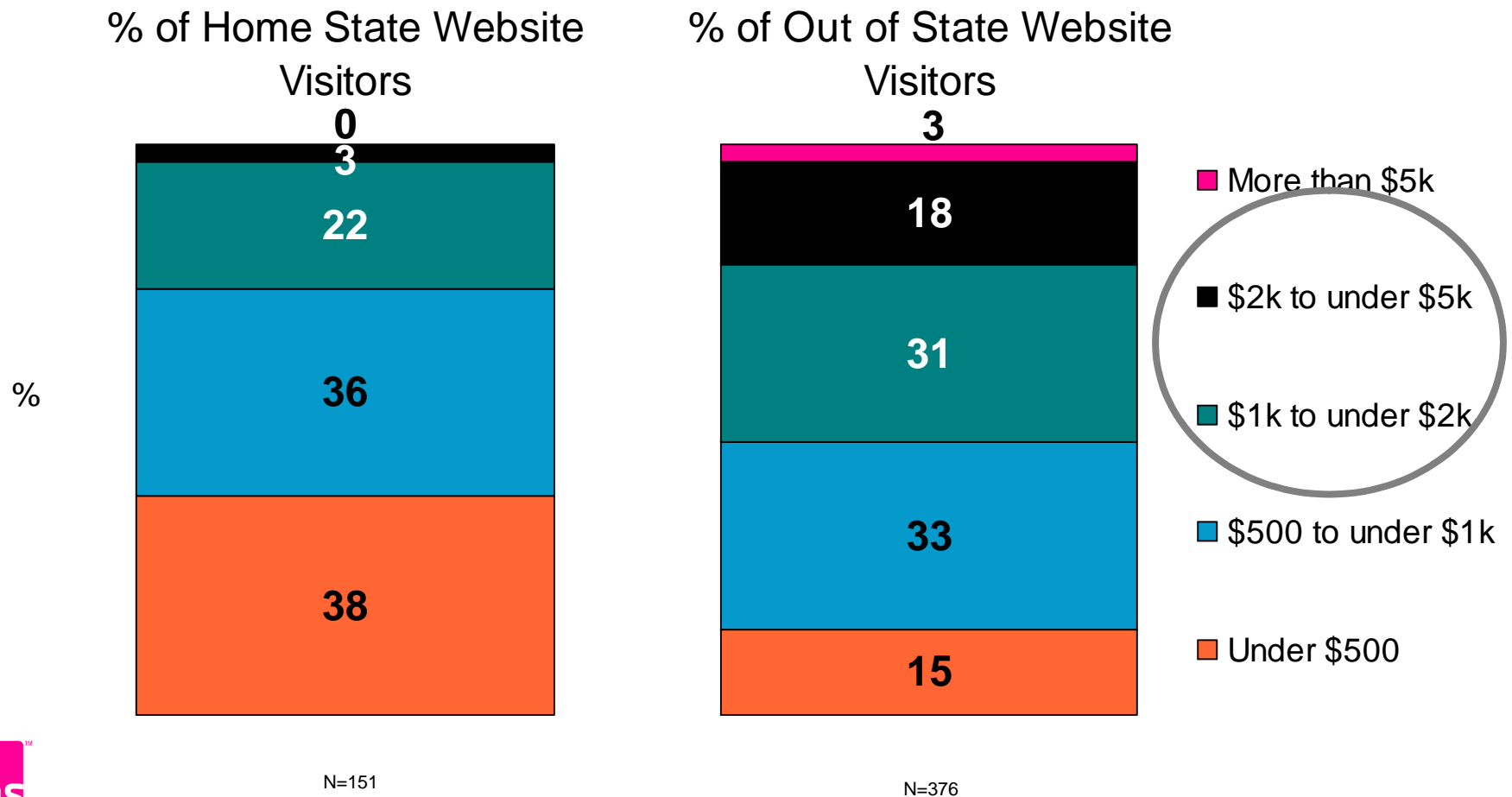
Small Base

\*participated in follow-up survey

# Out of State website visitors typically spend more \$

Out of State travelers\* spent \$2,125 on average in Montana

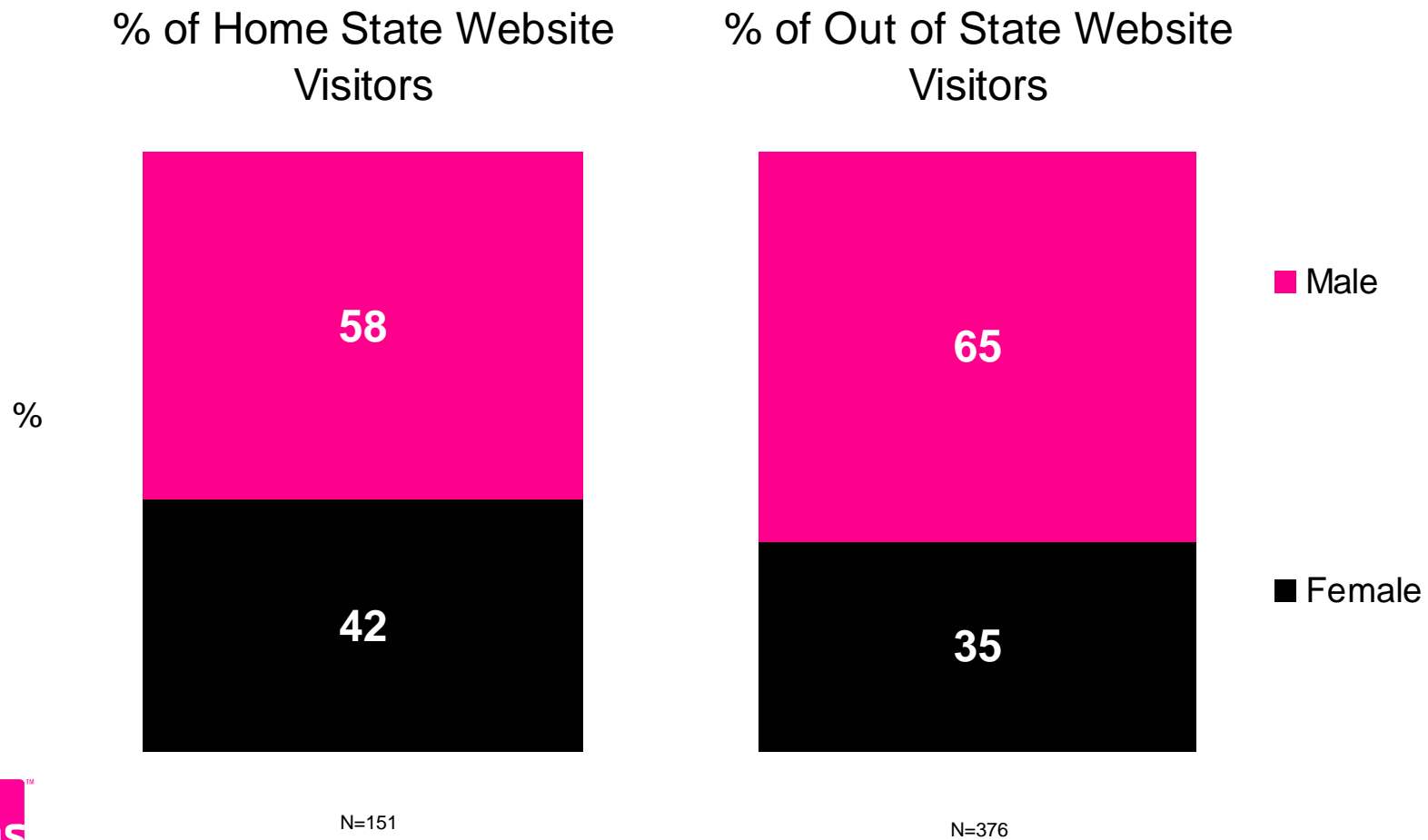
How Much Do Website Visitors Typically Spend on a Trip?



\*participated in follow-up survey, N=33; Very small base; excludes transportation costs to the destination

# Men have a very large share of website visits

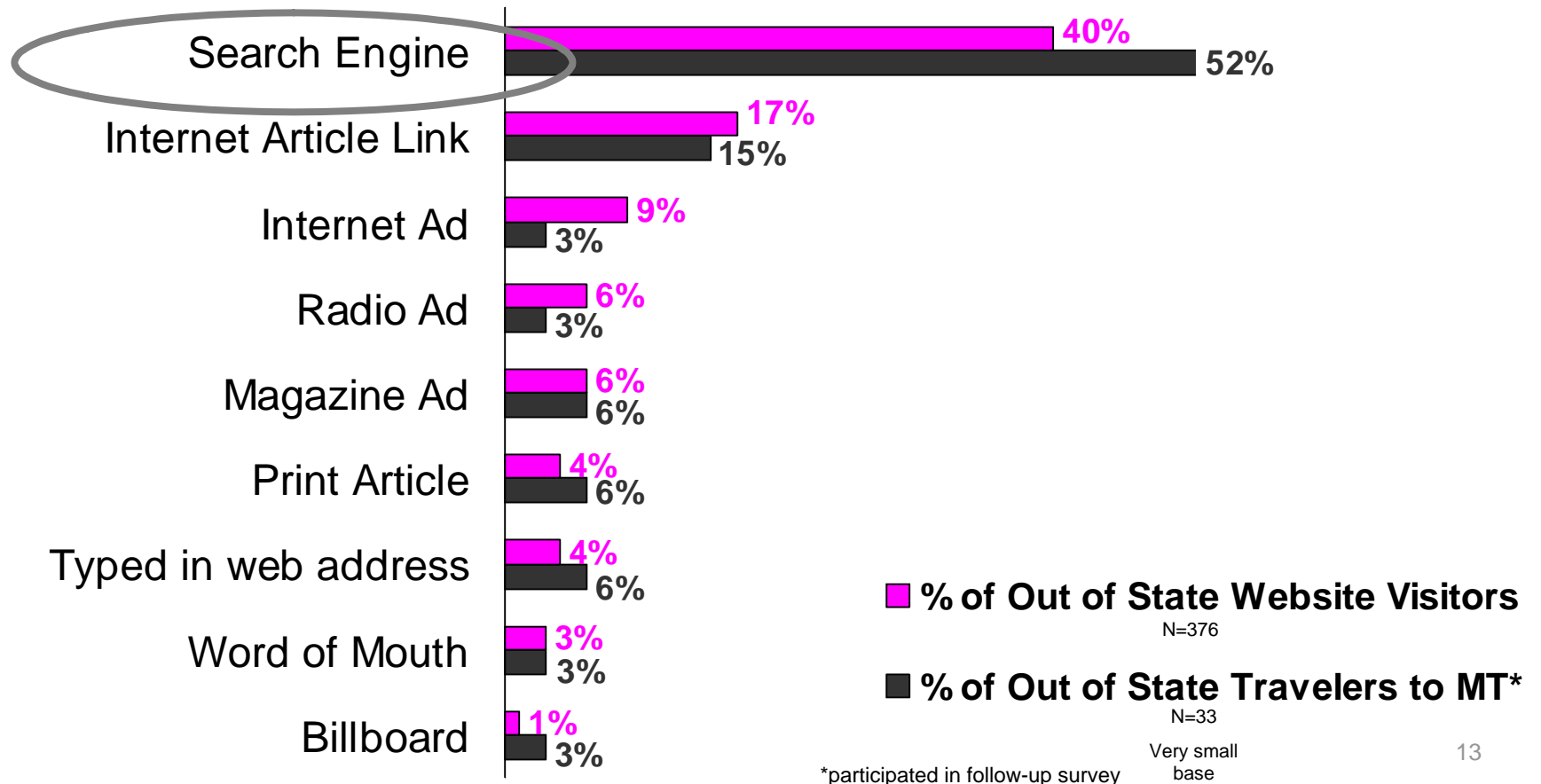
## Gender of Website Visitors?



# Website Usage...

# Internet Search is key

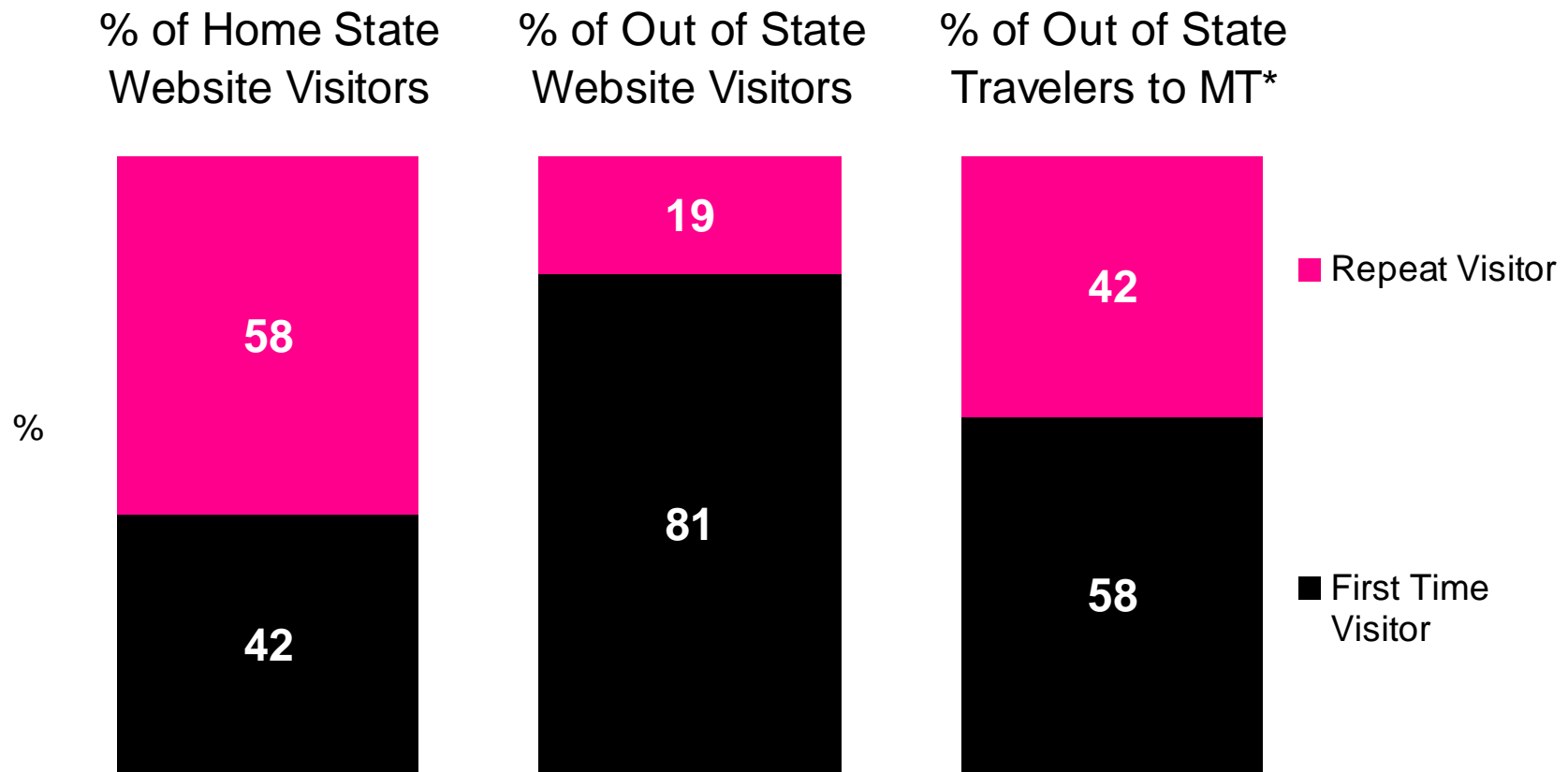
How Do They Become Aware of the Website?



# Usually one chance to make a good first impression

Repeat website usage is high among Out of State travelers to MT

How Many were First Time Website Visitors?



N=151

N=376

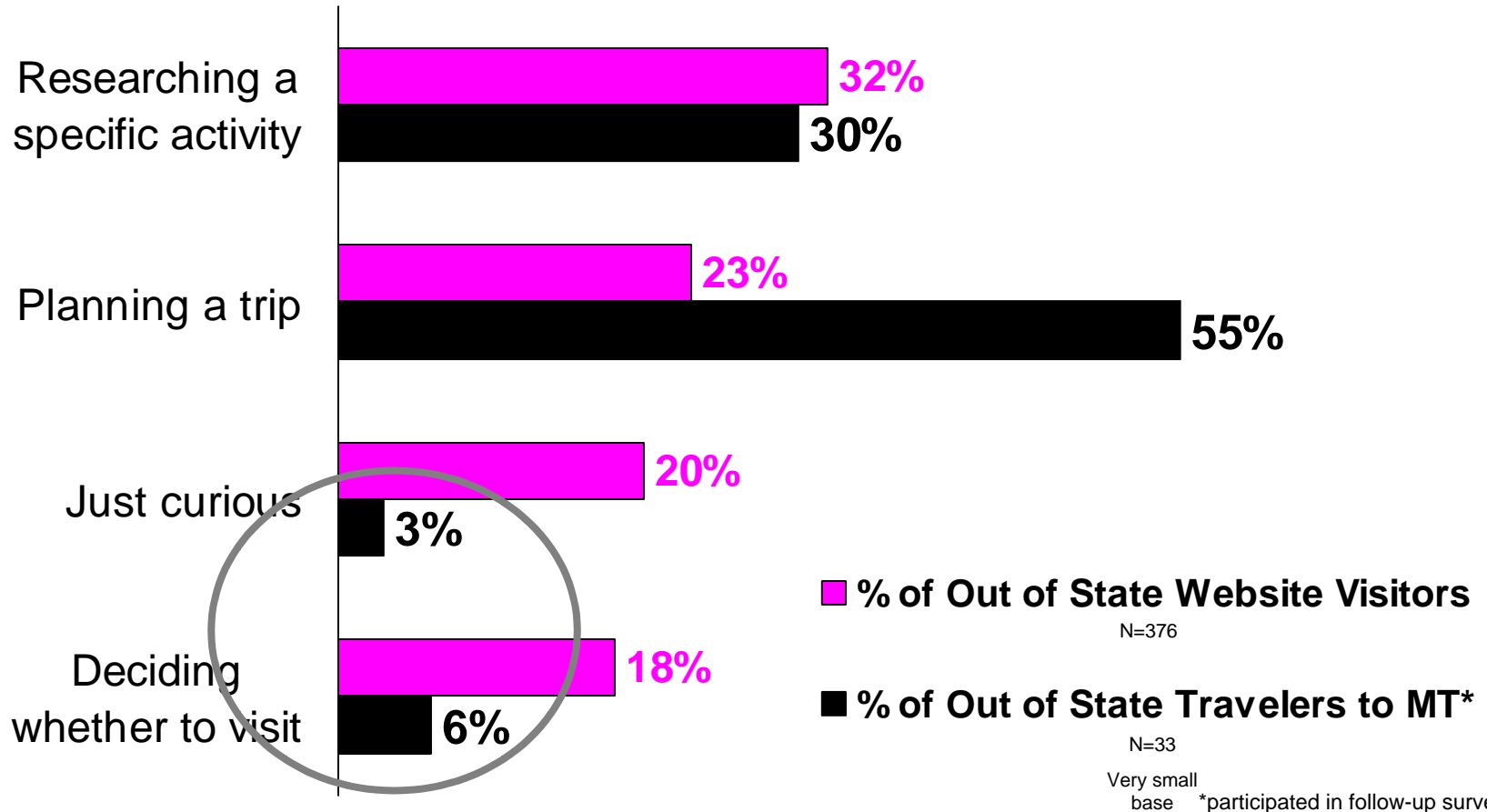
N=33

Very small  
base

\*participated in follow-up survey

# Website facilitated 85% of Out of State travelers' researching & planning...& helped 9% to choose MT

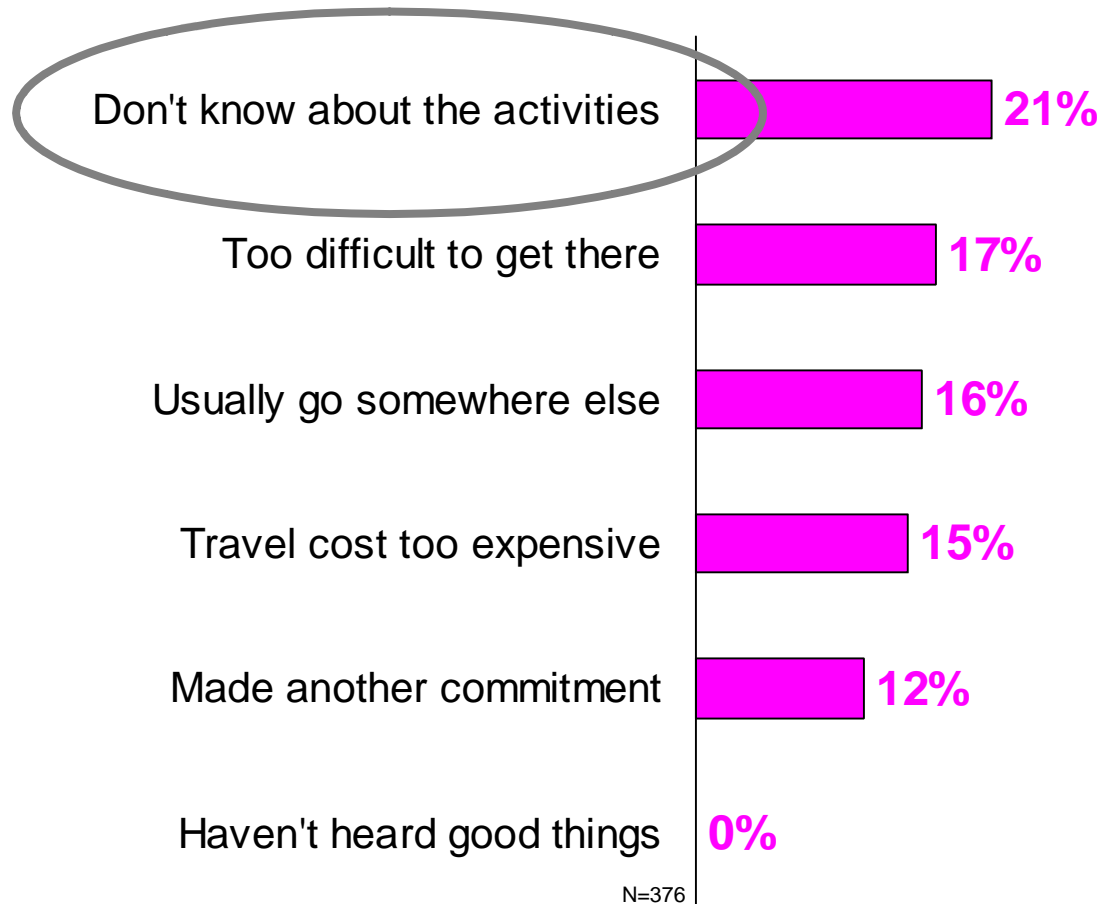
## Why Do They Visit the Website?



# Website provides opportunity to overcome #1 obstacle

## Why Haven't They Visited Montana Yet?

% of Out of State Website Visitors





# Image...

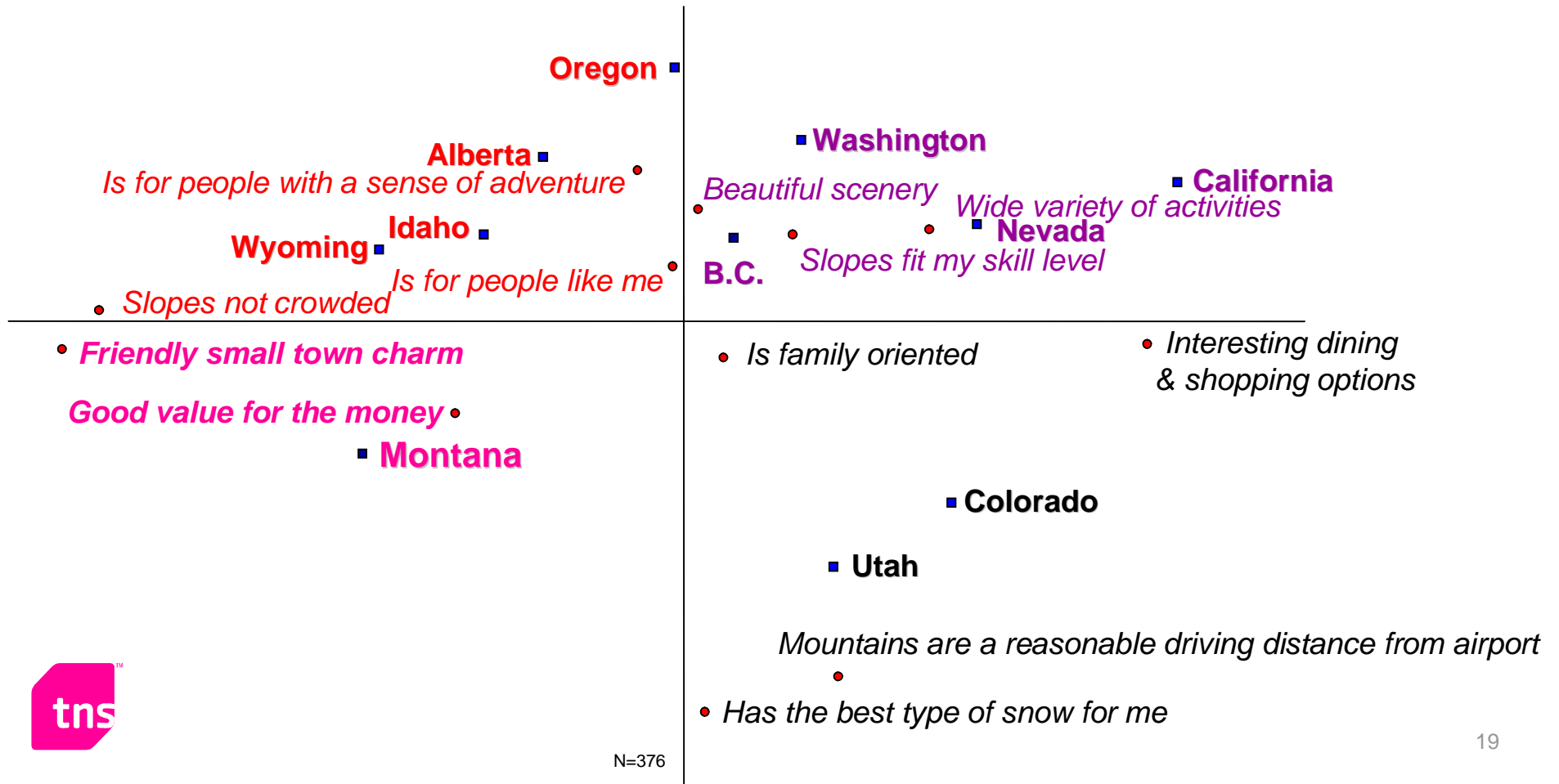
# Perceptual maps express site visitors' image of states

- Demonstrates **what is most distinctive about a state**:
  - Which attributes stand out **relative to other states**
  - Areas of opportunity / focus for marketing communications
- The closer a state is to an attribute or set of attributes, the more it is distinguished by those attributes.
- States that are close together have the same "type" of image.
- Perceptual maps are based on the mathematical distance between states and attributes.
  - *Perceptual maps do not indicate absolute scores*

# 'Good value' and 'Friendly small town charm'

What Perceptions Distinguish Montana  
Relative to Other States?

of Out of State Website Visitors



# Travel Intent...

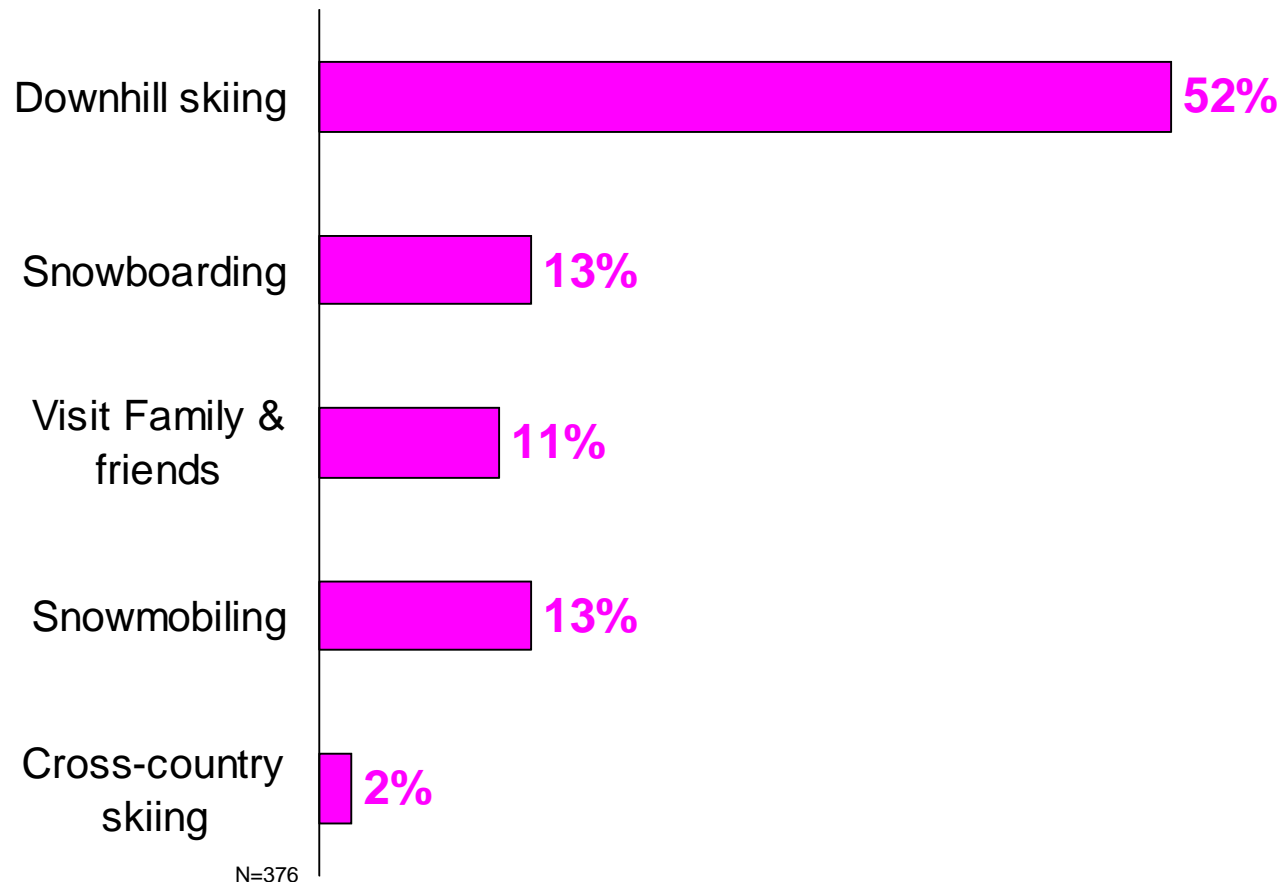
# And What Happened.



# Downhill skiing is the prime attraction

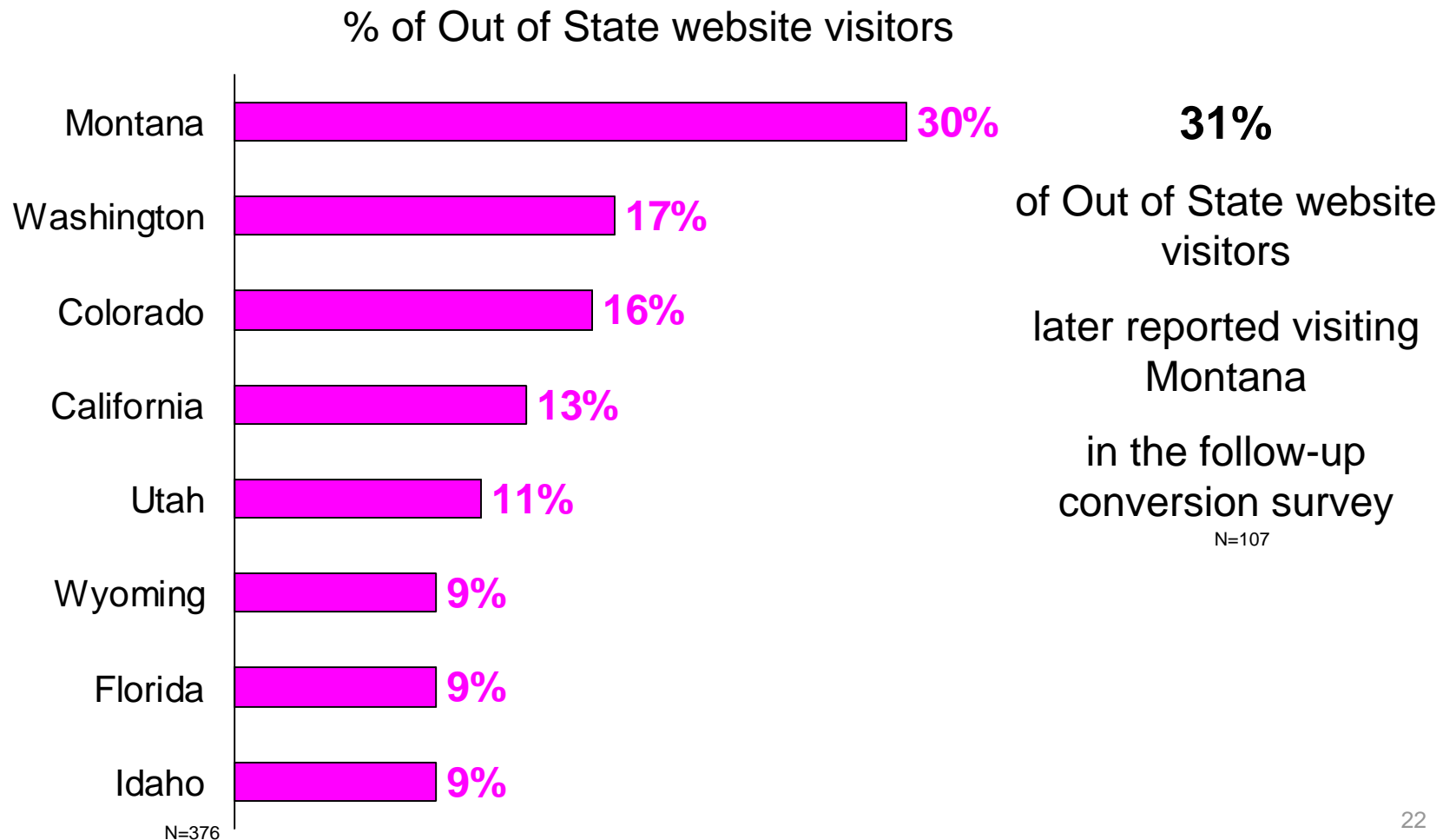
What would be the Primary Purpose of Visiting Montana?

% of Out of State website visitors



Nearly twice as many website visitors are interested in visiting MT than other states...& they followed through

How Many Said They Are “Extremely Likely” to Visit Montana?



# Website Effectiveness...

# Measuring Effectiveness using the Test/Control Method

- One group has experienced the site and the other group only entered the site
- Compare the two groups to **isolate the effects of the website**.
- For example, if “likelihood of visiting Montana” differs significantly between a test and control group, then the website is effective in influencing likelihood of visiting Montana.

## TEST GROUP

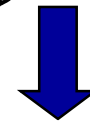
(Experienced the Website)



Invited to take survey  
either after or before  
experiencing the site

## CONTROL GROUP

(Only Entered the Website)



2 samples are collected &  
later compared



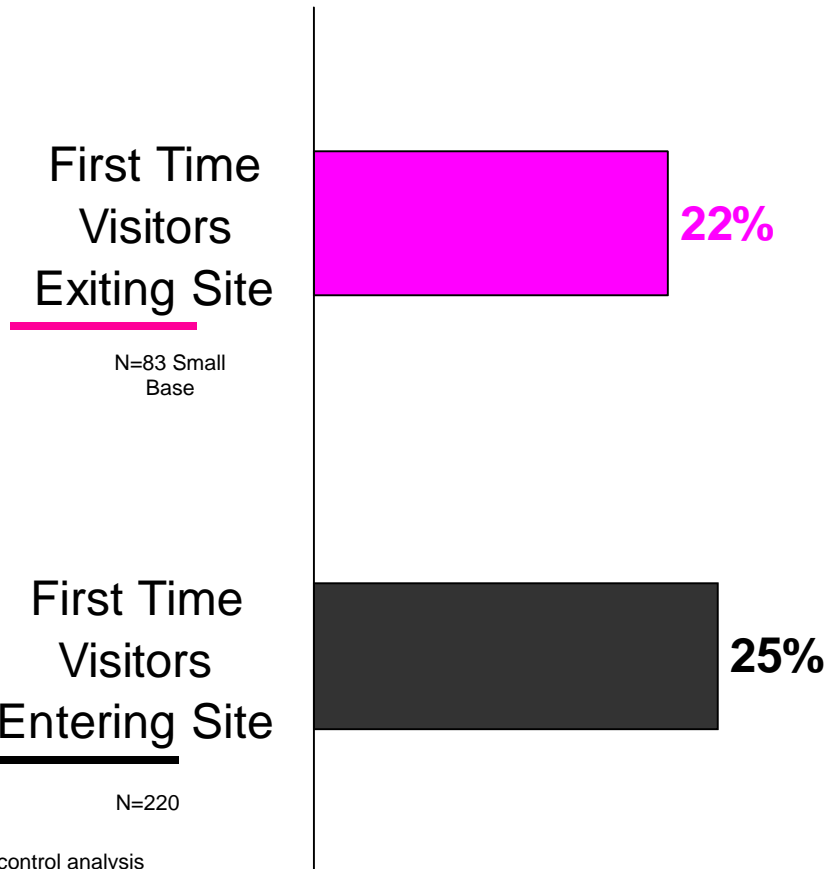


# No significant impact on first time Out of State visitors

## No significant difference in “Extremely Likely” to Visit the State

Does the Website Build Interest in Visiting Montana?

% Extremely Likely to Visit MT (Out of State website visitors)



A test/control analysis

# Repeat site visits significantly impact Out of State visitors

## Significant difference in “Extremely Likely” to Visit the State

Does the Website Build Interest in Visiting Montana?

% Extremely Likely to Visit MT (Out of State website visitors)

Repeat  
Website  
Visitors



52%

N=73  
Small Base

First Time  
Website  
Visitors



24%

N=303



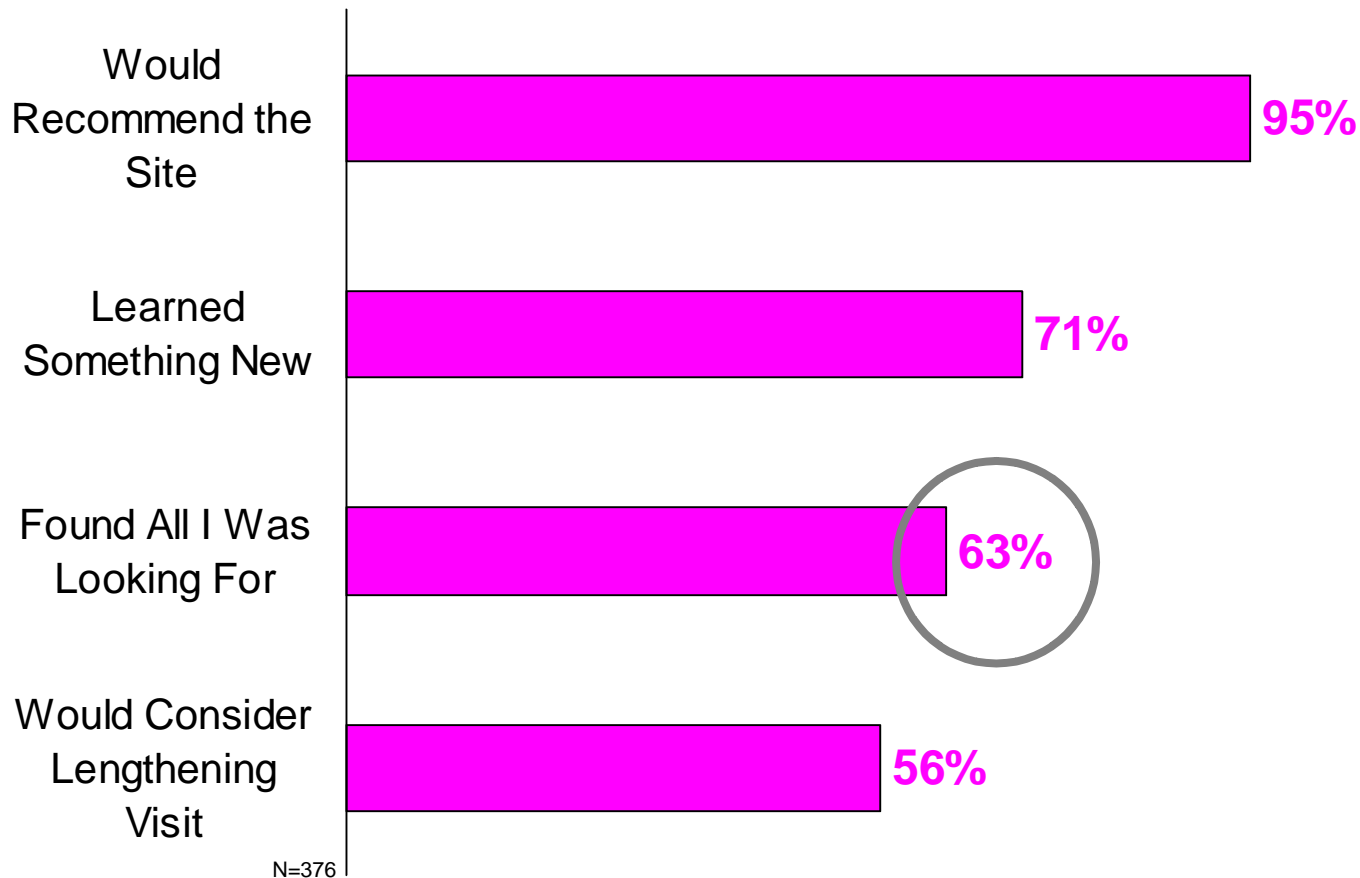
Not a test/control analysis

# Highly recommended and influencing length of stay

Room for improvement—nearly 40% didn't find all they wanted

## How Effective is the Website?

% of Out of State website visitors



# Listening to Website Visitors...

# Website visitors' suggestions...

- More prominent placement of “Plan Your Winter Trip”
  - May address the large majority of needs
- More consolidated information like links to lodging and activities, including price ranges and contact information
- *“A forum to read people’s experiences”*
- More pictures and video
- *“More web-cams of actual ski areas”*
- Easier way to forward information to friends and family



# Converting Website Visitors... to Montana Visitors.

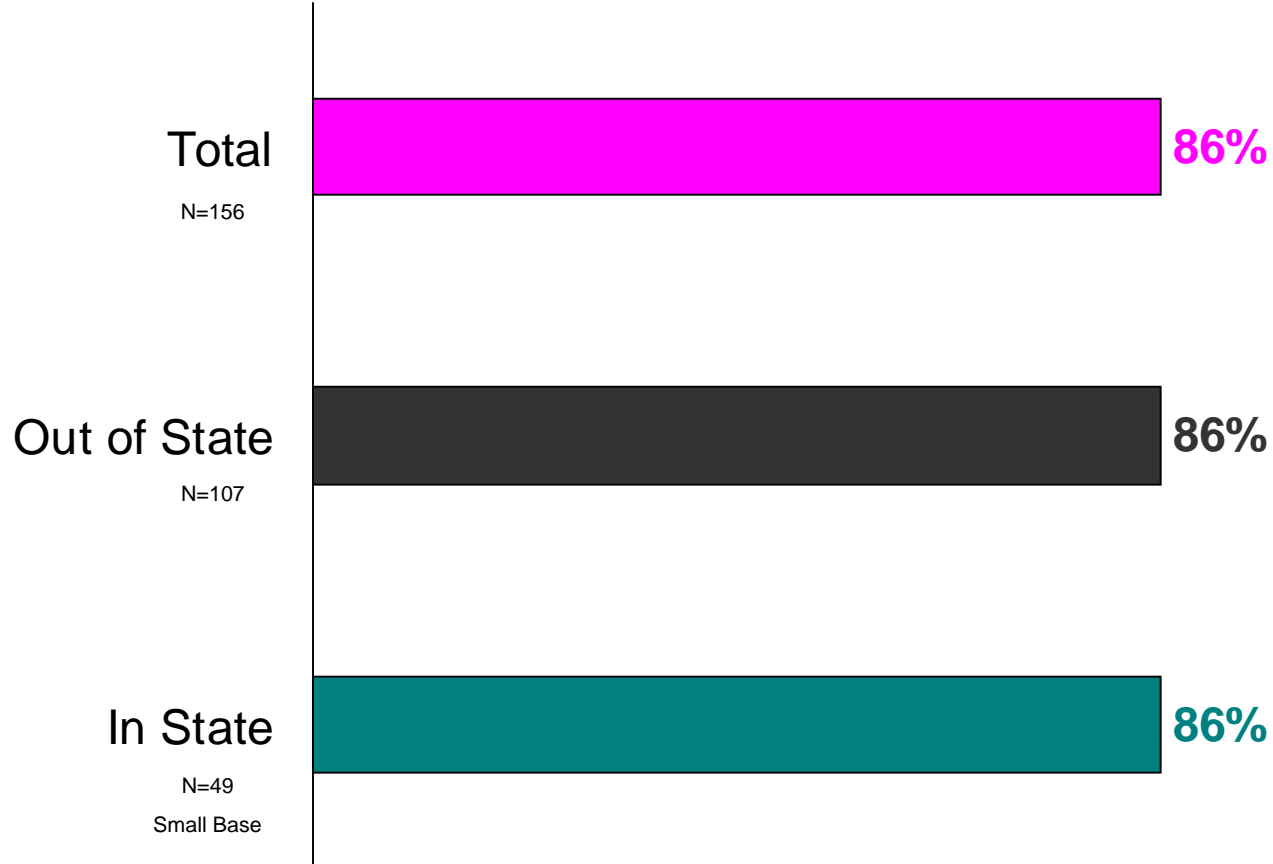


# Large majority of website visitors took winter trips

## No difference between In State and Out of State site visitors

Did you take any leisure trips or vacations this winter season?  
(October 07-March 07)

% of Website Visitors\*



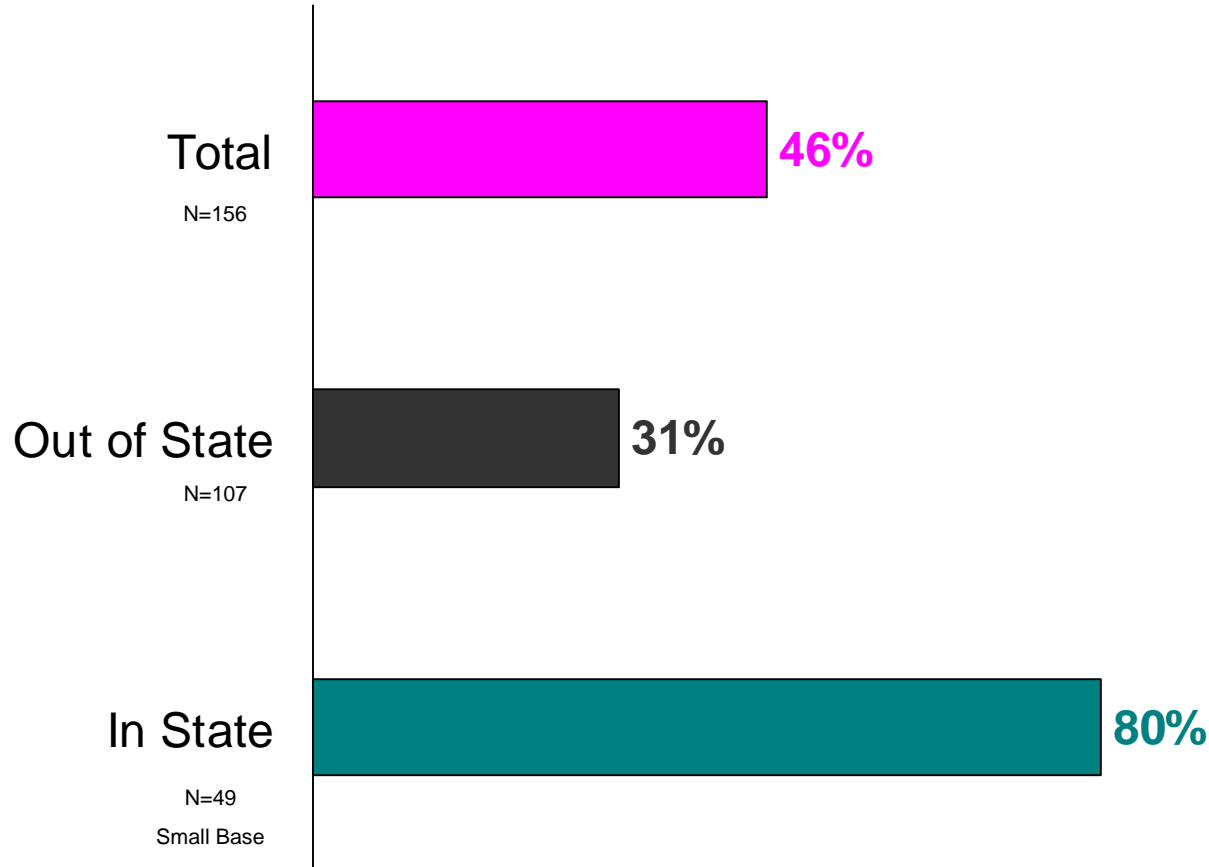
\*participated in follow-up survey

# Nearly a third of Out of State web visitors traveled to MT

## Large majority of In State web visitors took a trip in MT

Did you take any leisure trips or vacations to Montana this winter season?  
(October 07-March 07)

% of Website Visitors\*



\*participated in follow-up survey

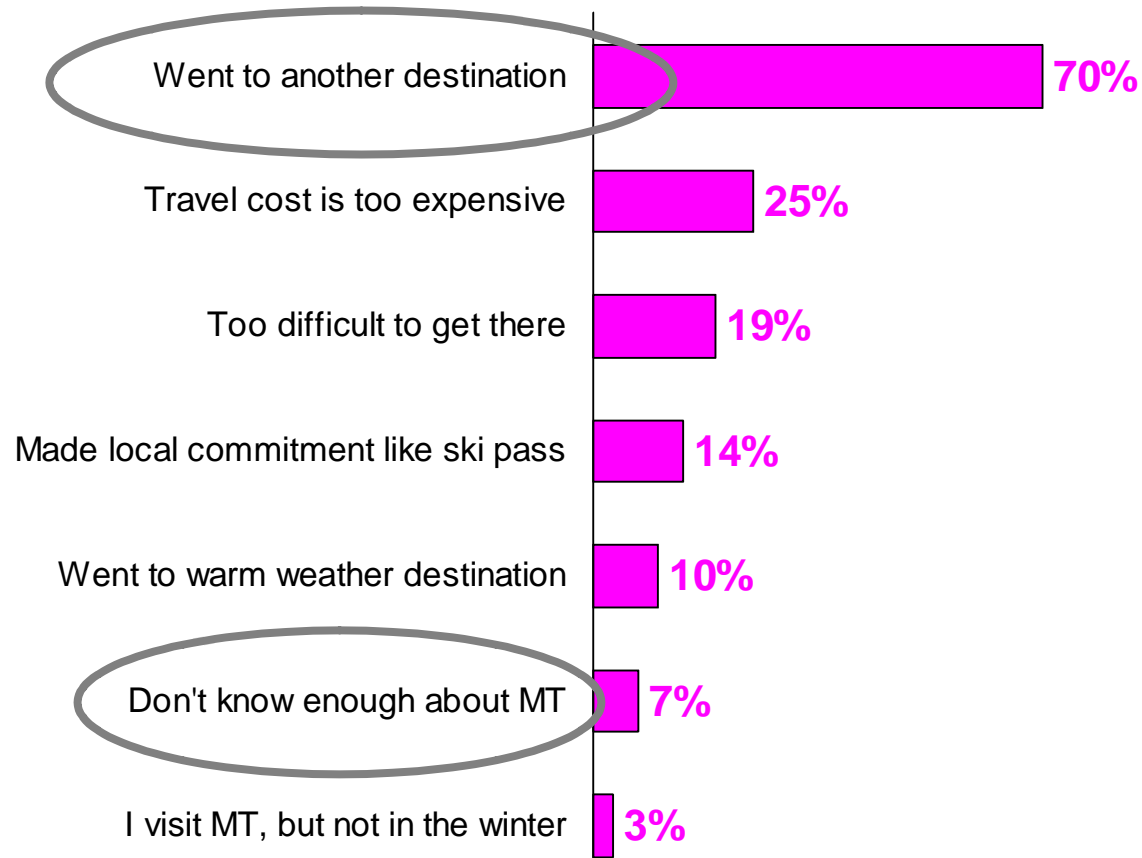


# Competition was the main reason for not visiting MT

7% did not know enough about MT's activities/terrain

Why did you not take a leisure trip or vacation in Montana this winter?  
(October 07-March 07)

% of Out of State Website Visitors\* that Traveled, but not to MT



\*participated in follow-up survey

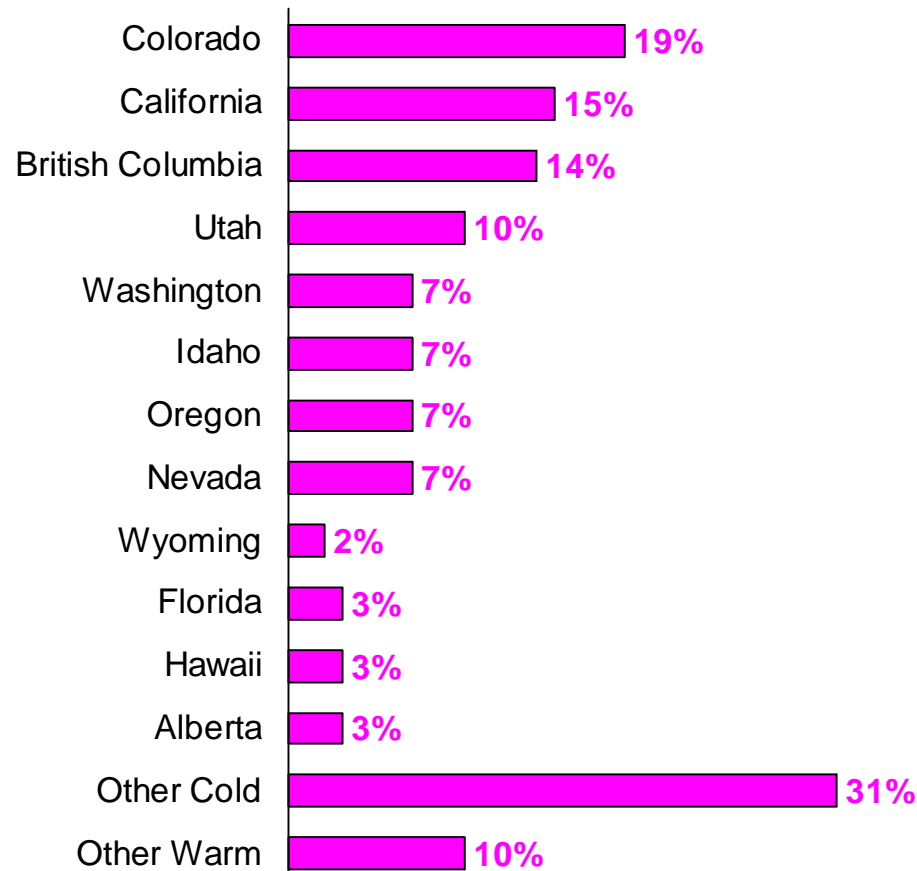
N=59; Small base

# Alternatives to Montana were cold destinations

Colorado and British Columbia were among top competitors

Where did you take a leisure trip or vacation this winter?  
(October 07-March 07)

% of Out of State Website Visitors\* that Traveled, but not to MT



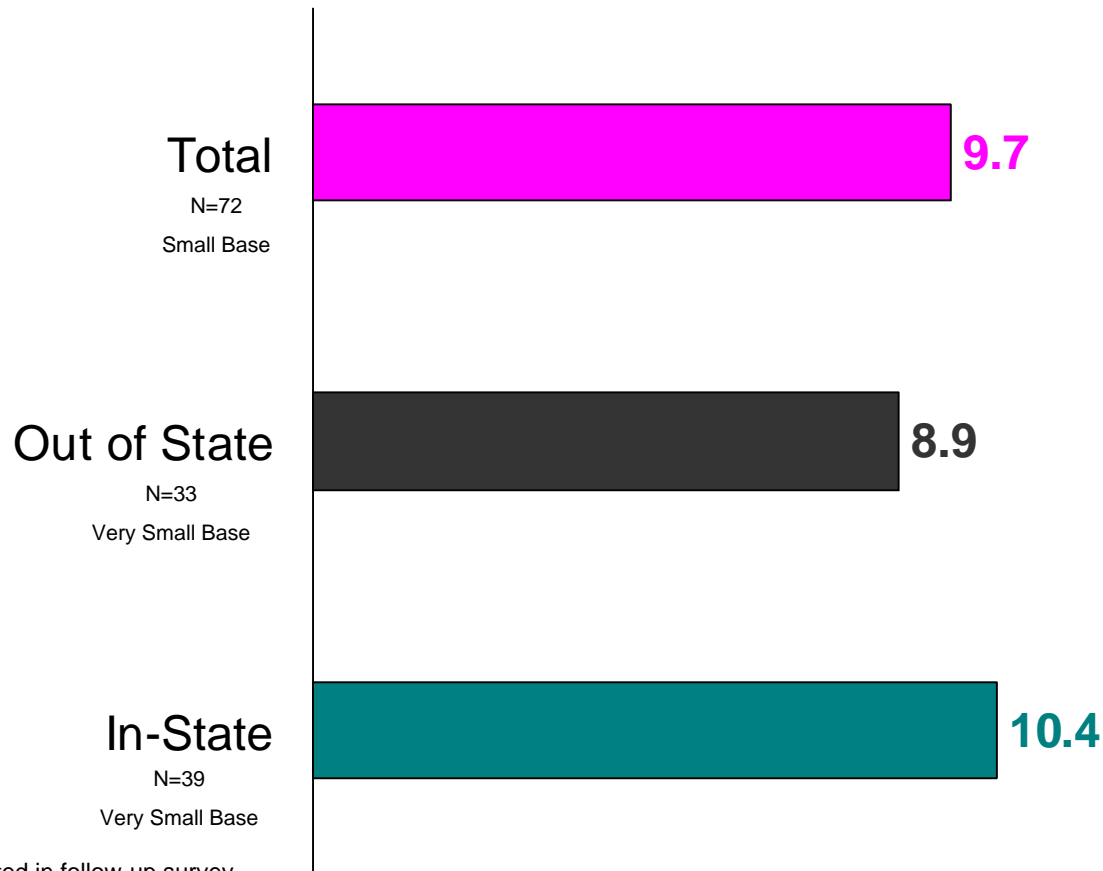
\*participated in follow-up survey

N=59; Small base

# Out of State travelers vacation as long as locals in MT

How many **days in total** did you spend in Montana this winter during your leisure trips or vacations? (October 07-March 07)

# of days in total in MT among Website Visitors\* who took trips in MT

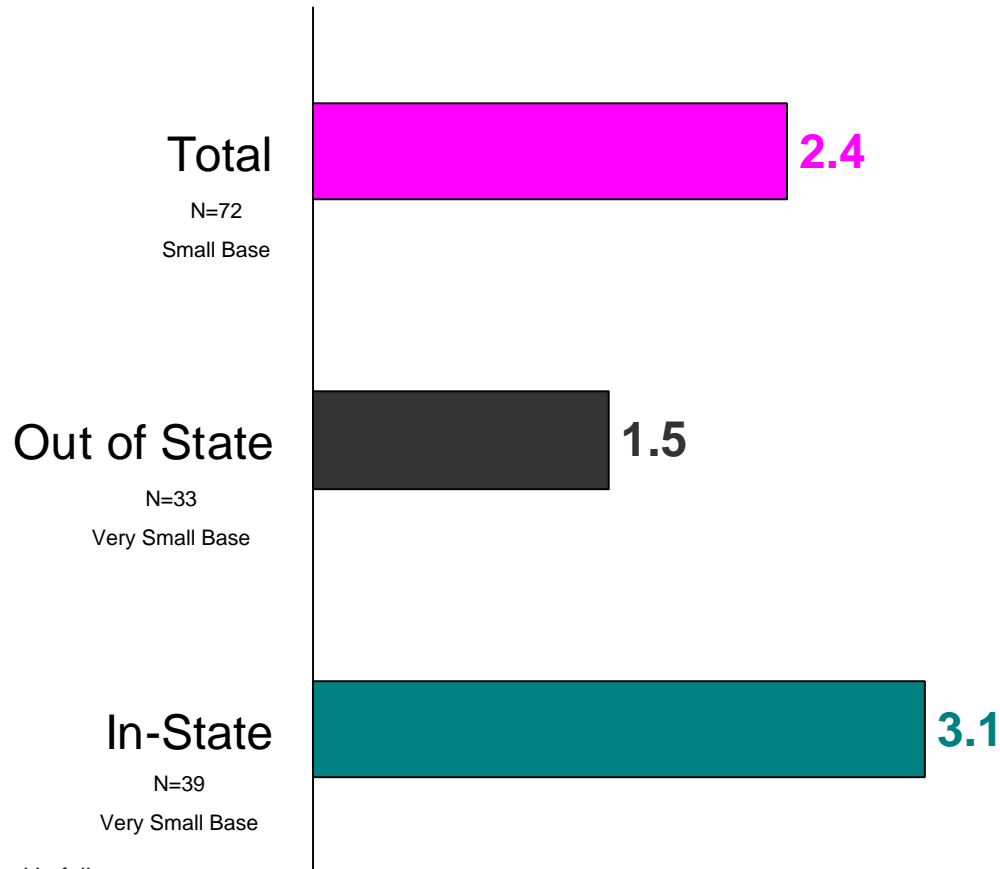


\*participated in follow-up survey

# Out of State travelers took two trips to MT on average

How many leisure **trips or vacations** did you take within Montana this winter?  
(October 07-March 07)

# of MT trips among Website Visitors\* who took a trip in MT



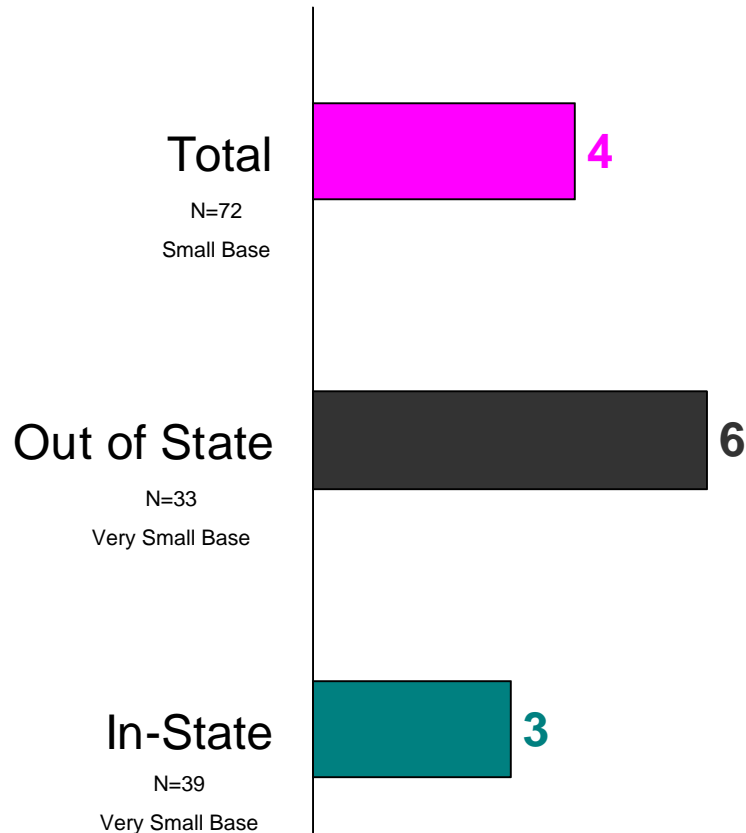
\*participated in follow-up survey

# Out of State trips are for nearly a week on average

## In state trips last a little over a weekend

How many days in total / How many trips  
(October 07-March 07)

Average # of days per trip among Website Visitors\* who took a trip in MT

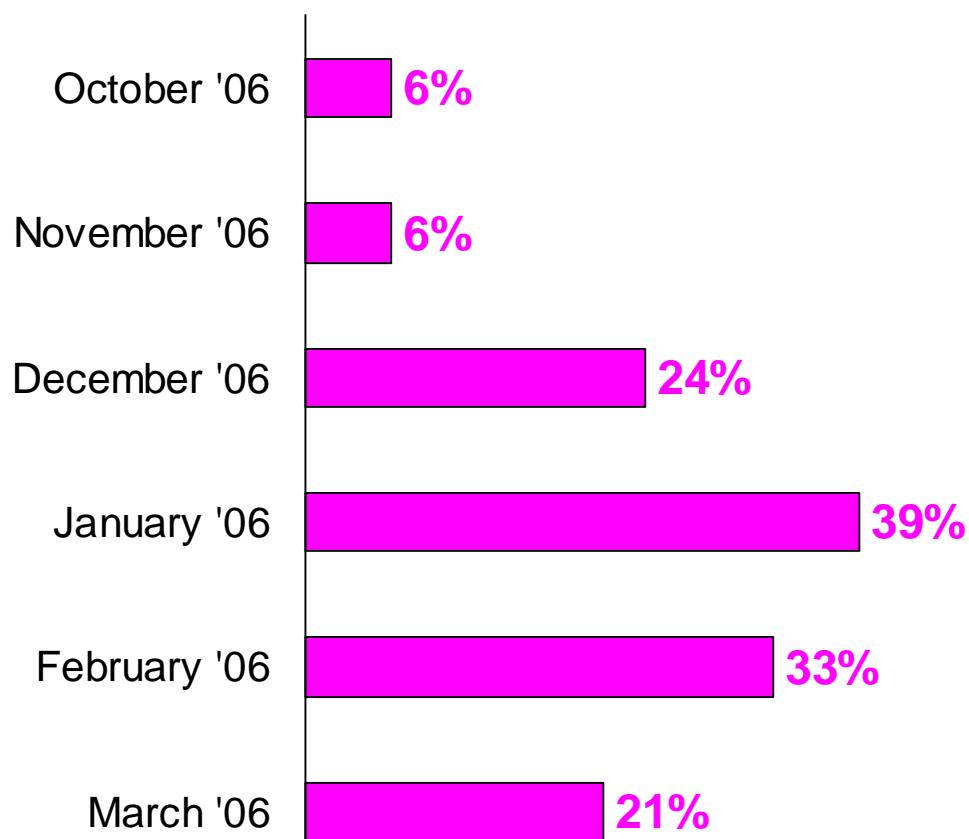


\*participated in follow-up survey. Average # of days per trip is calculated using mean averages with one decimal; this explains why dividing by the whole numbers in this report do not exactly match the above numbers.

# January-February are peak travel months

In which months did you travel in Montana for leisure trips or vacations?  
(October 07-March 07)

% of Out of State Website Visitors\* who took a winter trip to MT



N=33

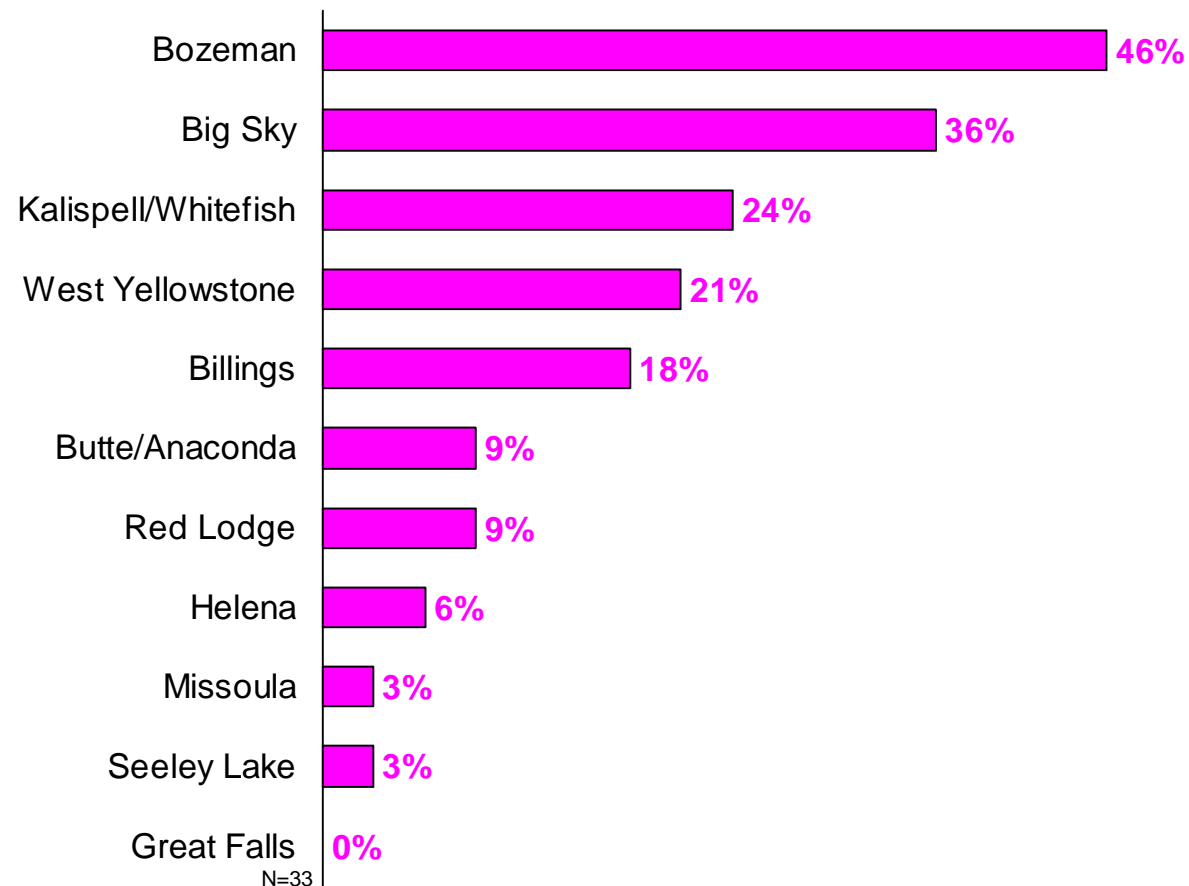
\*participated in follow-up survey

Very Small Base

# Bozeman and Big Sky are top destinations

In which areas did you spend time in Montana this winter for leisure trips or vacations? (October 07-March 07)

% of Out of State Website Visitors\* who took a winter trip in MT



\*participated in follow-up survey  
Very Small Base

# Out of state visitors spend twice as much per trip

Website visitors are a high spending segment of MT visitors

How much money did you spend during your most recent winter leisure trip or vacation in Montana? (October 07-March 07)

\$	OUT OF STATE	IN STATE	TOTAL
<b>Lodging</b>	\$594	\$332	\$452
<b>Other</b>	353	65	197
<b>Winter Activities</b>	337	182	253
<b>Food/beverage/dining</b>	240	210	240
<b>Shopping/gifts</b>	216	93	149
<b>In-state transportation</b>	169	11	83
<b>Groceries</b>	121	93	149
<b>Other entertainment</b>	59	89	76
<b>Parking/tolls</b>	2	4	3
<b>Total</b>	<b>\$2,125</b>	<b>\$1,079</b>	<b>\$1,559</b>



N=33  
Very Small Base

N=39  
Very Small Base

N=72  
Small Base



# Website facilitated nearly \$37 million of MT tourism \$ from website visitors during the study period Oct.–Nov. 2006

## Return on Website Investment Website Visitors from Oct.–Nov. 2006

<b>Winter website visitors</b> (# of unique visitors from Webtrends website traffic Oct.–Nov. 2006)	<b>51,043</b>
<b>Website conversion rate</b> (calculated from follow-up survey; N=156)	<b>46%</b>
<b># of website visitors that traveled to MT</b> (Website visitors X Conversion rate)	<b>23,480</b>
<b>\$ spent in MT per website visitor</b> (Does not include transportation costs to MT; follow-up survey; N=72, small base)	<b>\$1,560</b>
<b>Projected \$ spent by all website visitors that traveled to MT</b>	<b>\$36,628,800</b>
<b>\$ cost for website</b>	<b>\$141,319</b>
<b>Travel spending per website \$</b>	<b>\$259</b>

# Website facilitated nearly \$23 million from Out of State from website visitors during the study period Oct.–Nov. 2006

## Return on Website Investment Out of State Website Visitors from Oct.–Nov. 2006

<b>Winter website visitors</b> (# of unique visitors from Webtrends website traffic Oct.–Nov. 2006)	<b>51,043</b>
<b># of Out of State website visitors</b> (calculated from intercept survey; N=527; 67% X 51,043)	<b>34,199</b>
<b>Website conversion rate (among Out of State website visitors)</b> (calculated from follow-up survey; N=107)	<b>31%</b>
<b># of website visitors that traveled to MT</b> (Out of state website visitors X Conversion rate)	<b>10,602</b>
<b>\$ spent in MT per Out of State website visitor</b> (Does not include transportation costs to MT; follow-up survey; N=33, very small base)	<b>\$2,125</b>
<b>Projected \$ spent by Out of State website visitors that traveled to MT</b>	<b>\$22,529,250</b>
<b>\$ cost for website</b>	<b>\$141,319</b>
<b>Travel spending per website \$</b>	<b>\$159</b>

# Website facilitated nearly \$150 million of MT tourism \$ assuming Oct.–Mar. website traffic behaved the same as Oct.–Nov. sample

## Return on Website Investment Website Visitors from Oct. 2006–Mar. 2007

<b>Winter website visitors</b> (# of unique visitors from Webtrends website traffic Oct. 2006–Mar. 2007)	<b>207,352</b>
<b>Website conversion rate</b> (calculated from follow-up survey; N=156)	<b>46%</b>
<b># of website visitors that traveled to MT</b> (Website visitors X Conversion rate)	<b>95,381</b>
<b>\$ spent in MT per website visitor</b> (Does not include transportation costs to MT; follow-up survey; N=72, small base)	<b>\$1,560</b>
<b>Projected \$ spent by all website visitors that traveled to MT</b>	<b>\$148,794,360</b>
<b>\$ cost for website</b>	<b>\$141,319</b>
<b>Travel spending per website \$</b>	<b>\$1,053</b>

# Website facilitated over \$90 million from Out of State assuming Oct.–Mar. website traffic behaved the same as Oct.–Nov. sample

## Return on Website Investment Out of State Website Visitors from Oct. 2006–Mar. 2007

<b>Winter website visitors</b> (# of unique visitors from Webtrends website traffic Oct. 2006–Mar. 2007)	<b>207,352</b>
<b># of Out of state website visitors</b> (calculated from intercept survey; N=527; 67% X 207,352)	<b>138,926</b>
<b>Website conversion rate</b> (calculated from follow-up survey; N=107)	<b>31%</b>
<b># of website visitors that traveled to MT</b> (Out of state website visitors X Conversion rate)	<b>43,067</b>
<b>\$ spent in MT per website visitor</b> (Does not include transportation costs to MT; follow-up survey; N=33, very small base)	<b>\$2,125</b>
<b>Projected \$ spent by Out of State website visitors that traveled to MT</b>	<b>\$91,517,375</b>
<b>\$ cost for website</b>	<b>\$141,319</b>
<b>Travel spending per website \$</b>	<b>\$648</b>

Who uses the

What do

visitors want

Is the website effective

on the site?—

—Can it be used?—

Planning tools

& visuals

as likely to travel to MT

nearly half

Boomer Men



# Recommendations...

# Winter Website Evaluation Review

## Recommendations

- TNS recommends that the home page be optimized using copy-testing techniques common in advertising, but tailored to home pages. This will help connect more of the site's core audience with the Montana brand:
- Men, upper middle class, young baby boomers, from nearby states—especially Washington, who are interested in downhill skiing, and are planning to spend a week & \$2,000.
- Two-thirds of website visitors are from Out of State. The vast majority will be visiting the website for the first time after finding it through a key word search using Google or Yahoo!. According to Webtrends log data, most visitors will only view the home page—view it in under a minute then leave. Most will choose to travel to a near-by competitor.
- The test/control test did not show the website had a significant impact on Out of State first time website visitors' likelihood to travel to Montana. However, repeat visitors are much more likely to travel to Montana. Hooking more visitors into the site is an opportunity to increase site usage and travel.



# Winter Website Evaluation Review

## Recommendations

- Explore potential improvement in features and content.
  - Features and content should help aid research & planning of week long trips for Out of State visitors, & weekend trips for In State visitors.
  - Nearly forty percent of website visitors did not find all that they are looking for. Explore planning features that help consolidate activities, lodging, pricing, contact information, and user feedback. Consider the capabilities of Yahoo! Trip Planner, which integrates these features. Can Yahoo! power some of these features within the Travel Montana site and be filtered for Montana?
- Consider increased communications investment in paid Search.
- Increase number of references from MSN un-paid searches.
  - Webtrends data shows a low number of references from MSN.



# Thank you.





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